

Contributions of Historic Preservation

TO QUALITY OF LIFE OF FLORIDIANS



UF UNIVERSITY of
FLORIDA

EXECUTIVE SUMMARY

Center for Governmental Responsibility, University of Florida Levin College of Law • Department of Urban and Regional Planning,
UF College of Design, Construction and Planning • Center for Tourism Research and Development, UF College of Health and Human Performance
Department of Museum Studies, UF College of Fine Arts • Florida Trust for Historic Preservation

In the preamble to the National Historic Preservation Act Congress found that the preservation of America's heritage **"is in the public interest so that its vital legacy of cultural, educational, aesthetic, inspirational, economic and energy benefits will be maintained and enriched for future generations of Americans."** In other words, in 1966, Congress was convinced that the American public's "quality of life" would improve as an indigenous part of the preservation of its historic towns and neighborhoods. Four decades later, National Trust for Historic Preservation President Richard Moe opened the annual conference with remarks that re-confirmed that organization's concern for "quality of life" and how preservation, if properly integrated, can better our communities.

Recently, Donovan Rypkema, one of the nation's foremost preservation planners made the observation about newly revitalized historic areas that not long ago were nearly dead: "I do not know of a single sustained success story in downtown revitalization anywhere in the US where restoration (preservation) was not a key component of the effort. That doesn't mean it isn't theoretically possible to have downtown revitalization but no restoration, *but I don't know about it, I haven't read about it, I haven't seen it.*"

Indeed, the well-being and potential for the recycling of older communities is an increasing concern in states such as Florida in all aspects of urban and regional planning. For some time, preservationists have suspected that there is a real connection with a tangible and elusive community spirit that rises from a sense of place often associated with unique neighborhoods, whether they qualify for the National Register of Historic Places, or not. It just so happens that recognized neighborhoods have one up on those that do not have that identity.

By understanding how this connection works, we can see the means to maintain the cultural and historical qualities that contribute to Florida's older neighborhoods while also meeting the needs of quality living and housing. As this study shows, quality of life is now being measured from all angles; its quantifiable qualities can in large part include standard of living, economic and housing opportunities, as well as access to goods and services. Quality of life can also encompass freedom, happiness, creativity and artistic impression, environment, and health; qualities that are far harder to measure.

Although in the past historic preservation has too often been seen as a separate and prior activity that prepares the way for the improvement of neighborhoods, we know now that revitalization requires that historic sites be given a role in the life of the community. The point is not to place the community's historic assets under lock and key, but to integrate them safely and evenly into the fabric of everyday life. Local residents can benefit through outdoor markets, handicrafts, houses, cuisine, businesses, civic and religious centers, and interpretive components such as learning and recreational activities that complement an historic site's didactic offerings and convey a special meaning between its past, present and future. The more the community is involved, the more successful and inviting the area will become for everyone.

Because of this overlap in the relationship between better quality of life and historic preservation, when properly integrated into planning, this very much needed report exploring these conditions will help in developing an integrated approach to planning for historic and other uniquely special communities in Florida. It is a worthy companion to the previously published "Economic Impacts of Historic Preservation in Florida".

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Photos: COVER (clockwise from top left) Mission San Luis, Tallahassee, winner of the 2006 "Preserve America" Presidential Award for Heritage Tourism, presented at the White House; Miami Beach Art Deco District: Lake Mirror Wall, Lakeland; and Mount Dora's Historic District. TABLE OF CONTENTS: Cà d'Zan, Ringling Estate, Sarasota. BACK COVER: Ybor City.



Introduction & Overview

The State of Florida's heritage, whether in archeological resources, historic structures, sites, and districts, spans the entire era of human settlement:

- Indian Mounds
- 18th century Spanish colonial
- Cracker structures of the 19th century
- Bungalows and chert houses of the early 20th century
- The distinctive modern style of the Sarasota School of Architecture
- Roadside structures and sites such as the early theme parks
- 1950s ranch houses that are just now becoming eligible for listing on the National, and many local, registers.

The heritage of our past and the productive and respectful use of such historic places in the present strengthen the quality of life for the future of our state. Identifying what is distinctive and shared about this heritage is essential to understanding how historic preservation contributes to the quality of life in Florida.

What is the relationship between historic preservation and quality of life? Historic preservation contributes to economic and cultural values in the State of Florida. Those cultural values are reflected in the quality of life found in the state's communities from small towns to large urban areas.

Quality of life is a vague term with multiple meanings. As used in this paper, it relates to the sense of place created by the tangible and

intangible characteristics of Florida's historic places.

Florida's elected officials have directly addressed the significance of historic preservation to the quality of life in the State of Florida, finding that:

“The rich and unique heritage of historic properties in this state, representing more than 10,000 years of human presence, is an important legacy to be valued and conserved for present and future generations. The destruction of these nonrenewable historical resources will engender a significant loss to the state's quality of life, economy, and cultural environment.” (FLA. STAT. § 267.01(1)(A))

This report, “Contributions of Historic Preservation to the Quality of Life of Floridians”, represents the first statewide study of how historic preservation fits into the overall quality of life in Florida. The report includes models and tools available to further historic preservation in Florida and to measure the impact of historical structures, events, and related activities on the enhancement of the quality of life in Florida. It is sponsored by the Florida

Historical Commission and the Division of Historical Resources in the Florida Department of State.

This report, a collaboration of four different colleges of the University of Florida and a non-profit organization specializing in historic preservation, is a follow-up to a 2002 report on the “Economic Impacts of Historic Preservation in Florida”, with the same sponsors and some of the same research team members. The two studies differ in

that the economic impacts study was derived from a quantitative review of available data related to historic preservation. That study offered a statewide analysis of historic preservation activity in Florida. It examined direct and multiplier effects from investment in historic preservation throughout the state in such

activities as historic rehabilitation of all types of properties, heritage tourism, Main Street investment, grants programs, tax credits and museum operations.

The quality of life study, contained in this Executive Summary, while reviewing many of the same programs available in Florida in the field of historic preservation, presents a qualitative analysis. Explicit measuring that results in a definitive number or dollar amount is not easily ascertainable for quality of life.





DeFuniak Springs

Some of the most lovingly preserved and picturesque downtowns are found in Florida's small towns. For sheer harmony and grace, DeFuniak Springs may be the state's most unspoiled city" (Mormino 2005: 40).

DeFuniak Springs shares a great deal with many other Florida cities – it was founded in the late nineteenth century when a variety of people were attracted to the state by a stream of publications that celebrated Florida's exotic landscape. As in many towns founded at this time, the railroad played a pivotal role; and development concentrated around the city's spring-fed lake and reflected a mix of low density commercial, governmental, religious, and residential structures in the vernacular and late Victorian styles that typified the era.

What is distinctive about DeFuniak Springs is its sense of place reinforced by its social history – connected to the Chautauqua Institute founded in 1869 in New York State. From its first assembly in 1885 until the early 1930s, DeFuniak Springs functioned as the southernmost home of the adult education movement that endorsed learning in a pleasing natural and built environment to uplift the intellect and the spirit.

In 1902, nationally prominent architects were hired to develop a plan to make the settlement into a model town. The layout – a public park surrounding the lake with public buildings interspersed in the landscape bounded by a street from which axial roads extend – makes the lake the town's centerpiece. While homes predominantly sit across the lakefront drive, the nearby railroad station forms the center of the town's commercial district. This core area of the historic town was listed on the National Register of Historic Places in 1992.



While measuring economic impacts can be approached from a statewide level, quality of life evaluations occur more often at the local level. Measuring quality of life occurs in people's perceptions and enjoyment of their state and communities. It looks at the physical environment but also the cultural aspects of the community. Defining quality of life issues includes several components, including historic preservation. How does historic preservation impact the livability of a city or a community?

The challenge posed in this research was identifying, developing, or applying previously developed methods for assessing the impact of historic preservation on the quality of life in Florida's communities. The value of this report is to assist individuals, neighborhoods, and communities in identifying creative methods for fostering historic preservation and for measuring its contribution to the quality of life in an area.

A 2005-2006 survey found that Florida residents are aware of their historic resources (roughly 55% of 1505 respondents had visited a historic site in the past year) and value the role that historic preservation plays in the state of Florida. Specifically, preservation is valued for what it can contribute to future generations (24%), for aesthetic reasons (17%), for educational reasons (14%), and for environmental reasons (13%) (see Russin in Technical Document to this work).

QUALITY OF LIFE & HISTORICAL PRESERVATION COMPONENTS

Researchers in this study examined historic preservation's impact on Florida's quality of life in five key areas:

Quality of Life Indicators

Community indicators allow us to explore the relationship between historic preservation and quality of life, expressed in terms of explicit outcomes. Community indicators are bits of infor-

mation that when combined, provide a picture of what is happening locally. Quality of life is reflective of the values that exist in a community, and indicators can be used to identify and promote a particular set of values. This chapter includes a chart of indicators to use in gauging, protecting, enhancing, and interfacing with historic preservation. The research also provides recommendations for implementing the framework through monitoring and measuring of the indicators.

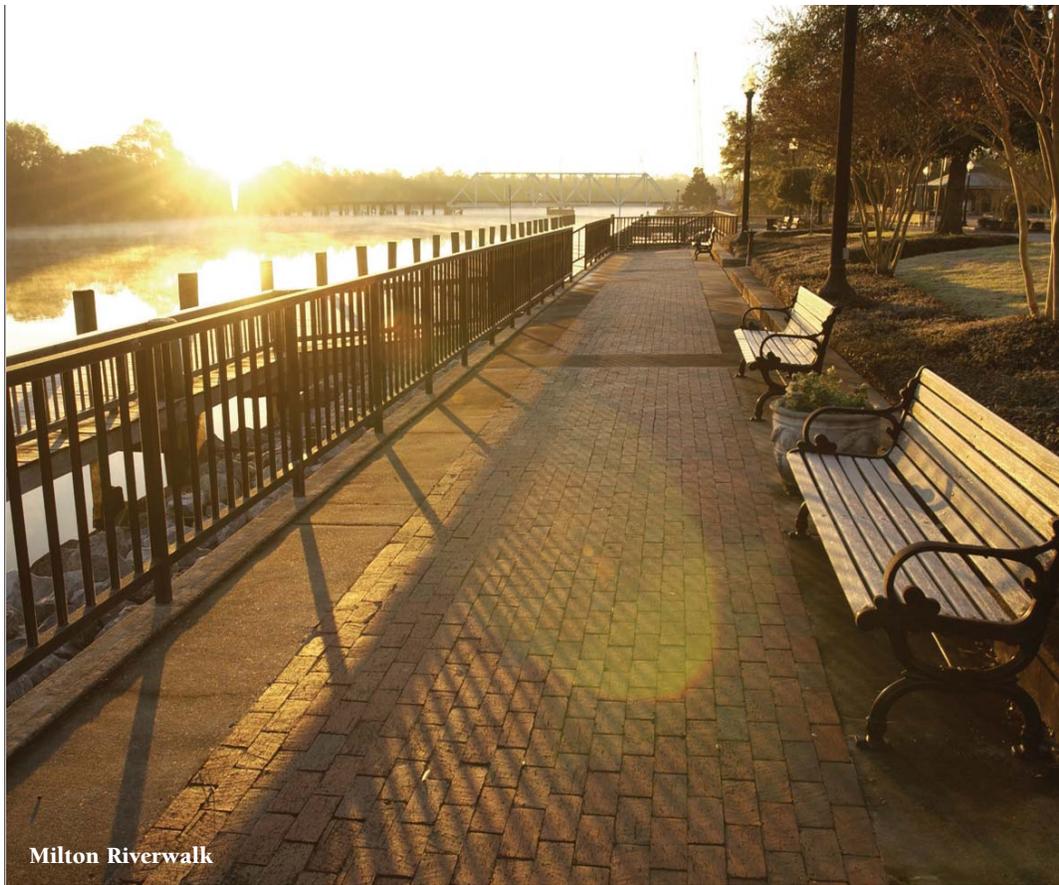
The Northeast Florida community of Fernandina Beach is offered as a case study of how economic development and historic preservation can be compatible and integrated to provide desirable outcomes while protecting a community's valuable resources.

Preservation Laws & Policies

Laws and policies reflect the priorities of a democratic society. They restrict things deemed harmful and seek to promote actions that are viewed as beneficial. Historic preservation laws reflect a decision by policy makers that our heritage, whether national or local, is significant and should be preserved for future generations.

This chapter discussed the two types of laws and policies that promote historic preservation: regulations and incentives.

Community programs that are described in this chapter include: mitigation efforts to protect historic resources in an interstate widening in Tampa; the Bridge of Lions rehabilitation in St. Augustine; adaptive reuse of an old church in Tampa Heights; Emerson Apartments rehabilitation and Pennsylvania Hotel rehabilitation, both in St. Petersburg; and projects enabled by state grants and the Florida Main Street Program.



Milton Riverwalk

Heritage Tourism

Historic preservation and heritage tourism support one another. Historic preservation provides the setting, the history, the persona, and the traditions for heritage tourism; heritage tourism provides the opportunity to educate, enjoy, and appreciate historic preservation.

The chapter on heritage tourism examines a county's quality of heritage tourism by evaluating the percentage of annual tourist-related tax revenue allocated for historic preservation by looking at the lodging tax. The researchers examined three case studies of use of lodging tax, including:

- Suwanee County
- Monroe County
- St. Johns County

History Museums

The most obvious impact of history museums on the citizens of Florida is the effect they have on the education of the state's children. Arguably, the central mission of history museums is to preserve the past for local audi-



Palm Beach

ences. The chapter on history museums assesses history museums' effect on three areas of quality of life:

- Education
- Community
- Economy

The researchers examine three case studies that represent a broad spectrum of Florida historic museums:

1. St. Augustine Lighthouse and Museum, a large history museum
2. Fort Christmas Historical Park in Central Florida, a small history museum in a rural area.
3. Riley House Museum, a small history museum near Tallahassee, specializing in a particular topic

Historic and Affordable Housing

Housing affordability and historic resources can mutually co-exist in neighborhoods and communities, though the rehabilitation of deteriorated houses may indeed pose chal-

lenges to affordability. The chapter on affordable housing identifies creative solutions to conflicts of gentrification, sustainability, and rehabilitation.

What tools then are available to meet these goals, specifically to attract the private sector to undertake such rehabilitation projects? Among them are building codes that accommodate rehabilitation, neighborhood conservation districts to complement local historic districts, community land trusts, expansion of existing revitalization programs such as Front Porch Florida, the historic rehabilitation tax credit combined with the low-income housing tax credit, preservation easements, revolving loan funds, property tax relief to address increased property values due to historic designation, and coordinated planning to proactively address potential challenges such as gentrification.

Specific case studies examine the use of Conservation Districts in Zephyrhills, Tampa, Miami and Sarasota, as well as an investigation of a Community Land Trust in Key West.

Within these five areas, researchers identified quality of life indicators that could be used to determine how that component contributed positively to a community. Individual case studies were selected to illustrate how to evaluate quality of life indicators. In order to include public perceptions of the relationship between historic preservation and quality of life, researchers commissioned a three-month-long survey of the attitudes of Floridians in regard to these topics.

SURVEY FINDINGS

To better gauge public perceptions of the relationship between historic preservation and quality of life,



Bridge of Lions, St. Augustine



Harriett Beecher Stowe House, Mandarin

researchers commissioned a three-month-long survey of the attitudes of Floridians in regard to these topics. A random sample of more than 1,500 Floridians was interviewed during a period between November, 2005, and January, 2006. The survey was conducted by the University of Florida Survey Research Center, the research and service unit of the Bureau of Economic and Business Research at the University of Florida.

The complete findings of the survey are included in the technical document that accompanies this Executive Summary.

Two key findings emerged that are relevant to this project.

1. Respondents identified what they see as Florida's most threatened historic resources as, in order: his-

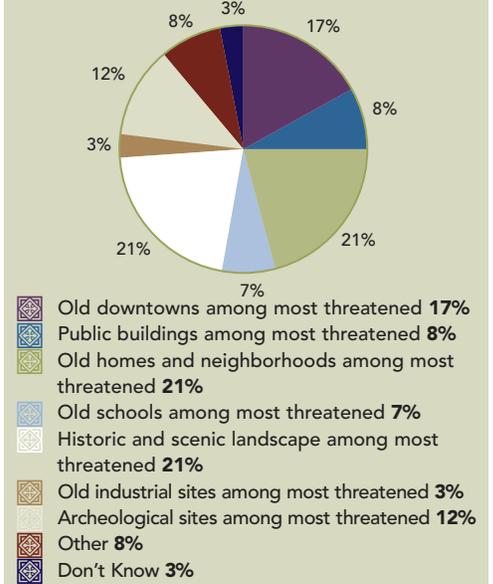
toric and scenic landscapes (21%); old homes and neighborhoods (21%); and old downtowns (17%).

2. Respondents said the most important reasons to preserve Florida's historic resources are, in order, for future generations (24%); scenic reasons (17%); and education (14%).

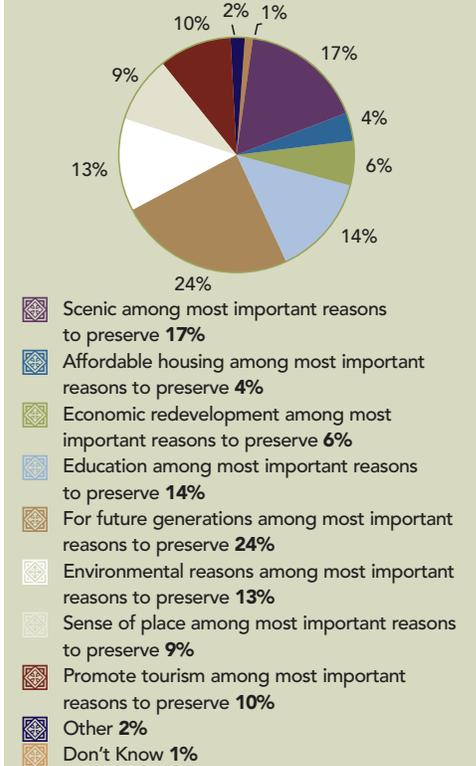
These findings would appear to indicate that the Floridians surveyed have an appreciation for historic resources and see a need to preserve them for the future.

The following chapters detail how each component of historic preservation can be measured to determine its impact on quality of life in Florida. Detailed descriptions of each of these programs are included in the Technical Report that supplements this Executive Summary.

Which historic resources in Florida are the most threatened?



What are the most important reasons to preserve Florida's historic resources?





Quality of Life Indicators

Historic preservation provides numerous benefits, including a profound and positive affect on quality of life for citizens and visitors alike.

There are numerous references to quality of life in historic preservation documents, in all types of literature – popular press, academic, and practitioner related works. Quality of life is assumed to be an intrinsically valuable outcome of historic preservation efforts, yet there are not many evident attempts to express this relationship explicitly. It is this implicit, assumed nature that provides the research opportunity at hand: what is the strength of this relationship, expressed in terms of explicit outcomes such as impacts?

This report presents a framework for exploring the relationship between quality of life and historic preservation, using community indicators.

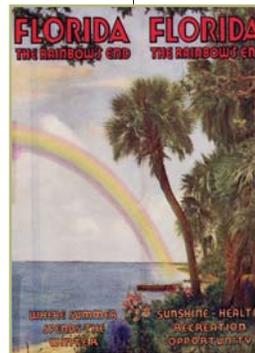
INDICATORS¹

What is the appeal of indicators? When used as a *system*, they hold much promise as an evaluation tool. What makes indicators any different from other

measures of aspects of places, such as job growth, per capita income, or housing prices? The key is developing an integrative approach – one that considers the impacts of change not only in economic terms, but also

the *social/cultural* and *environmental dimensions*. A community indicators system reflects *collective values*, providing a more powerful evaluative tool than simply considering the ‘economics’ of change and growth. By integrating an indicators system into overall community or regional planning, it will

be easier to evaluate the impacts of



Micanopy

Fernandina Beach

Fernandina Beach is located on Amelia Island, a coastal barrier island along the northeastern Florida coast. It is one of three incorporated areas in Nassau County and contains many of the area's historic properties. Its rich history includes the distinction of being the last town platted by the Spanish before they ceded Florida to the United States in the early 1800's. As one of the oldest settlements in Florida, it offers a charming Victorian seaside setting. Fernandina Beach was named "One of a Dozen Distinctive Destinations Worth Discovering" in 2002 by the National Trust for Historic Preservation. Given its expansive historic resources, it provides an excellent case study of how economic development and historic preservation can be compatible and integrated to provide the community desirable outcomes while protecting valuable resources.

Fernandina Beach has a rich historic fabric that for decades in the early and mid-20th century did not receive development pressures like other Atlantic coastal towns in Florida. This turned out to be very fortuitous for present day outcomes – because of its relative isolation away from the rapid build-up areas, the city was able to preserve its historic fabric. By the late 1960's, some began to realize what treasures these historic resources represented and initiated efforts to revitalize and preserve them. They realized that the resources represented a basis on which to build a tourism industry and the basis for desirable economic development outcomes. Actually, Fernandina Beach "rebuilt" a tourism industry because in the late 1800's, the city was a well recognized tourist destination, promoted and renowned by many as the "Newport of the South" (referring to Newport, Rhode Island, as a popular seaport resort town).

There are two historic districts in



Fernandina Beach that together contain 336 historic buildings. The districts are:

1. Downtown Historic District – This district, the Fernandina Beach Historic District, is a result of development of Fernandina in its "new" location to the south of Old Town Fernandina after the mid-19th century.
2. Old Town – This district encompasses the original settlement area for Fernandina Beach and abuts the waters of Amelia River.

The City of Fernandina Beach has benefited tremendously from its historic resources and by pursuing preservation-led strategies for economic development. Its downtown district is a major attraction for many tourists each year and offers a unique and quaint experience that is different from many coastal towns where all the same chain stores may exist and newer buildings are the standard. It is indeed a charming Victorian era seaside town and has done a commendable job of preserving its historic resources to date. They have a considerable number of historic properties to work with and as discussed in the subsequent section, they have garnered economic gains that are quite impressive for a small city.

Some issues have emerged that the City of Fernandina Beach and others concerned with protecting their historic resources will need to consider. One of these is that the rapid rise in market values of the properties can have some chilling effects on business activity, if property tax bills rise too high for local businesses to support. It also impacts new property tax assessments for buyers when a property is sold and may indicate that small, unique businesses could not afford to pursue new opportunities. A key to preserving the quality and character of a unique place like Fernandina Beach will be to address this and other issues to maintain balanced and sustainable preservation-based development.

This case illustrates that economic development and historic preservation are indeed compatible and can serve as a valuable basis on which to build and enhance a local economy. By preserving historic resources and enhancing their use and appeal, development outcomes can be realized that benefit not only the economic aspects but also the social and cultural dimensions with provision of a unique and desirable community.

changes, whether positive, negative or neutral. It is this ability of community indicators systems to be integrated as a system for gauging impacts across a full spectrum of outcomes that makes it beneficial to explore using them. Further, indicators incorporate both frameworks of performance and process outcomes, which serve to facilitate evaluation. When properly integrated, indicators hold the potential to go beyond just activity reports, to being utilized in the decision-making process as indicators of impacts and outcomes.

Just what is a community indicator? Essentially, community indicators are bits of information that when combined, provide a picture of what is happening in a local system. They provide insight into the direction of a community: improving or declining, forward or backward, increasing or decreasing. Combining indicators provides a measuring system to provide clear and honest information about past trends, current realities, and future direction, in order to aid decision-making. Community indicators can also be thought of as a report card of community well being. Bottom line: Community

indicators are bits of information that, when combined, generate a picture of what is happening in a local or regional system. It is important to note that these systems generate much data and it is the analysis of these data that can be used in the decision-making and policy/program improvement process. There are numerous functions of indicators, including: description, simplification, measurement, trend identification, communication, clarification, and as catalysts for action.

There are four common frameworks used for developing and implementing community indicators systems in the U.S.: 1. Quality of Life, 2. Performance Evaluation, 3. Healthy Communities, and 4. Sustainability. The framework presented most closely follows the quality of life format.

1. This section is excerpted in part from Community Indicators, Rhonda Phillips, American Planning Association, PAS Report No. 517, 2003.

2. Hoernig and Seasons, 2005. "Understanding Indicators," in Community Indicators Measuring Systems, Rhonda Phillips, ed., p. 5, London: Ashgate Publishing, Ltd.



Indicator Framework

The following table presents a list of the indicators selected to calibrate the framework. They are divided into four categories: gauging (related to type and amount); protecting (ordinances and regulations); enhancing (partnerships and incentives); and interfacing (uses).

A. Gauging

These indicators are related to the amount and type of historic resources in the community.

- Historic fabric
- Districts, structures, landmarks
- Distressed historic neighborhoods
- Rehabilitation/certified tax credits
- Assessed property value trends
- Historic district/property reinvestment

B. Protecting

These indicators are ordinances and regulations.

- Historic preservation element/plan integration
- Design guidelines
- Historic preservation commission
- Preservation ordinances
- Historic preservation survey
- Historic preservation staff
- Certificates and enforcement actions

C. Enhancing

These indicators are related to partnerships and incentives.

- Main Street program
- Certified Local Government
- Participation in other state/federal programs
- Historic preservation non-profits
- Neighborhood participation
- Civic/museum partnerships
- Tax exemptions
- Other incentive programs

D. Interfacing

These indicators are related to the uses of property.

- Housing affordability
- Business use
- Community draw factors
- Community use factors
- Heritage/cultural interactions



Preservation Laws & Policies

In a democratic society, our laws and policies ultimately reflect our priorities. Thus, we restrict things deemed harmful and seek to promote things that are viewed as beneficial. Historic preservation laws reflect a decision by policy makers that our heritage, whether national or local, is significant and should be preserved for future generations.

Historic resources have a value that can be seen as aesthetic and educational, in addition to whatever economic value they may have. There are two types of laws and policies that promote historic preservation: regulations and incentives.

How do Historic Preservation Laws contribute to Quality of Life?

Historic preservation programs can be a key piece of community revitalization, as well as an important part of maintaining the property and character of local historic neighborhoods. Historic districts typically require maintenance of property, thus preventing properties from becoming derelict. Historic tax credits and tax exemptions can foster the restoration of decayed historic buildings, whether in downtowns or residential neighborhoods. Historic districts need not be frozen in time. Indeed, sensitive infill development is often necessary and

appropriate, especially where there are numerous vacant lots. The revitalization that accompanies an ongoing historic preservation program can also contribute to increased public safety as vacant buildings become inhabited homes and businesses.

Types of Historic Preservation Laws

Regulatory historic preservation laws may mandate a specific substantive result (i.e. preservation of the historic resource). For example local ordinances allow for the designation of certain properties or neighborhoods as historic, and then authorize restrictions on the appearance or demolition of historic properties. These local laws are the most important element in preserving

privately-owned historic properties. The 52 Florida communities recognized as certified local governments each have local programs certified as meeting basic standards in the expertise of their preservation boards, the standards required for designating historic districts and landmarks, and the adoption of guidelines to protect historic neighborhoods.

Regulatory laws may also control a process (i.e. obliging federal or state agencies to consider the impacts of their undertakings on historic resources).

Thus, under Section 106 of the National Historic Preservation Act, federal agencies must consider the effects of federal or federally funded projects on historic resources. Similar procedural considerations are required by the National Environmental Policy Act and Section 4(f) of the Transportation

Act. These acts require notification of federal and state historic preservation officers about possible impacts on historic resources and allow them time to provide comments and suggestions about alternative approaches which will minimize any harm to historic resources.





ADAPTIVE REUSE OF HISTORICAL RESOURCES:

Tampa Heights Sanctuary Lofts

This former Methodist Church, located in Tampa Heights north of downtown, was originally built in 1910, and a Sunday school facility was added in 1927. When the congregation moved to another facility in 1998, the historic building was left vacant. A group of investors, led by Andrew Ham of Urban Trust, LLC, saw an opportunity to restore the building as a combination office/apartment complex. A partnership of several investors and the City of Tampa acquired the property and arranged financing. The federal rehabilitation tax credit, a 20% tax credit for rehabilitation of historic properties, made the \$3.1 million construction project possible.

The rehabilitation of the Greek Revival building had to be certified by the National Park Service as complying with the *Secretary of the Interior's Standards for Rehabilitation*. Following these standards, developers retained the building's historic features, including the outer walls, stained glass, hardwood floors, original corridors and the interior space of the former sanctuary. The Sunday School building was became 32 residential loft units with 12 foot ceilings, large windows and original architectural features. The former sanctuary was developed as 4,000 square feet of office space with a view to the dome overhead.

The new Sanctuary Lofts is one of the first residential loft projects undertaken in Tampa. The project benefited from a \$100,000 loan from the City to acquire the property, and from \$497,408 in rehabilitation tax credits. The result is attractive living and working space near downtown, and a model for adaptive reuse of historic buildings.



Incentives to promote Historic Preservation

Incentives, on the other hand, encourage preservation by providing some tangible benefit. These benefits may include tax relief, grants or relief from certain regulatory or procedural burdens. The benefit may be simple recognition of the historic importance of a structure or neighborhood, as is provided by the National Register of Historic Places or the National Historic Landmarks. Florida currently has more than 1,500 sites and districts on the National Register.

This recognition may entitle properties to further benefits. For example, those whose rehabilitation of income-producing historic properties is certified to be in conformity with the *Secretary of the Interior's Standards for Rehabilitation*, may receive the Federal Rehabilitation Tax Credit, a tax credit of up to 20% of the value of the rehabilitation work. Since 1986, nearly 450 Florida tax credit projects representing some \$556 million in construction have been approved by the National Park Service.

Local governments raise much of their revenues through property taxes. The willingness of counties and/or municipalities to forego some revenues in the form of tax exemptions can serve as an encouragement to property owners to invest in and rehabilitate their properties. Three types of local tax exemptions are possible in Florida. The first allows exemptions from property taxes for up to 50% of the assessed value of property that is: 1) used for commercial purposes or by a non-profit organization; 2) listed in the National Register, designated as a local landmark or part of a National Register or local historic district; and 3) regularly open to the public.¹ The second, most common type of exemption, allows for a ten-year exemption of the value by which historic properties are improved by rehabilitation.² A final exemption allows a total property tax exemption where rehabilitated historic properties are used for nonprofit or gov-



Merrill House, Jacksonville

ernmental purposes and where the building is open to the public.³ Florida communities increasingly make use of these tax incentives: in 2005, over \$137 million worth of property was exempt from ad valorem taxes due to these three types of historic tax exemptions.⁴

Grants are a further important incentive to preserve historic properties. The federal government provides grants under the Save America's Treasures program to preserve some of the most important landmarks in Florida. Under this program since 1999, thirteen Florida projects have been funded by Save America's Treasures, including \$353,000 for preservation at the Ringling estate of Cà d'Zan in Sarasota, \$795,000 for preservation work at the Biltmore Hotel in Coral Gables and \$450,000 to preserve the Singing Tower at the Bok Sanctuary in Lake Wales.⁵

INCENTIVES TO PROMOTE HISTORIC PRESERVATION:

St. Petersburg

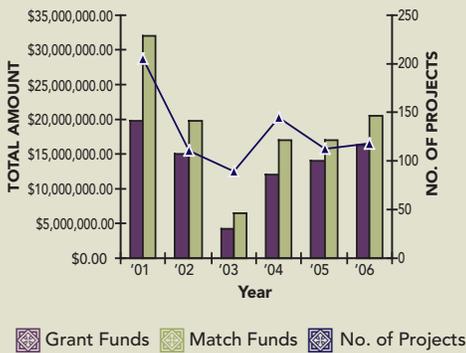
Emerson Apartments
Restored in 2005



RESTORATION		NON RESTORATION	
Soft Costs	\$ 215,000	Soft Costs	\$215,000
Historic Construct. (72 S.F.)	\$ 815,000	Non Historic Construct. (60 S.F.)	\$675,000
Total Development Cost (92 S.F.)	\$ 1,030,000	Total Development Cost (78 S.F.)	\$890,000
PRESERVATION INCENTIVES		NO INCENTIVES	
Fed Tax Credits 20%	\$ 163,000	Fed Tax Credits 20%	\$ 0
Ad Valorem Tax Exemption (\$407,000)	\$ 815,000	Ad Valorem Tax Exemption (\$407,000)	\$ 0
TDRs @ \$10 S.F.	\$ 150,000	TDRs @ \$10 S.F.	\$ 0
Facade Easement	\$75,000	Facade Easement	\$ 0
Annual Property Taxes	\$ 6,300	Annual Property Taxes	\$ 6,300
Net Development Cost (\$52 s.f.)	\$ 588,674	Net Development Cost (\$80 s.f.)	\$ 890,000

Provided by Bob Jeffrey, City of St. Petersburg

Florida Historical Grants



Recent Grant Projects

SUNKEN GARDENS, ST. PETERSBURG

\$350,000 in 2002 to the City of St. Petersburg to help restore 1926 Mediterranean Revival style building for use as children's science museum, restaurant and administrative offices for Sunken Gardens tourist attraction.

BOK TOWER GARDENS

\$600,000 in 2 grants, in 2001-02, to rehabilitate the famous Bok Tower's masonry and steel work.

PRITCHARD HOUSE, TITUSVILLE

\$350,000 grant to Brevard County to rehabilitate historic house as a museum.

OLD GYMNASIUM, ARCHER

\$320,000 grant to the City of Archer to rehabilitate an old gymnasium as community center.

SOPCHOPPY, WAKULLA COUNTY

\$842,000 in 4 grants, since 1998, to restore 1924 school and auditorium for use as a performing arts center.

CAPE SAN BLAS LIGHTKEEPER'S QUARTERS

\$300,000 grant to 1917 building as a museum.

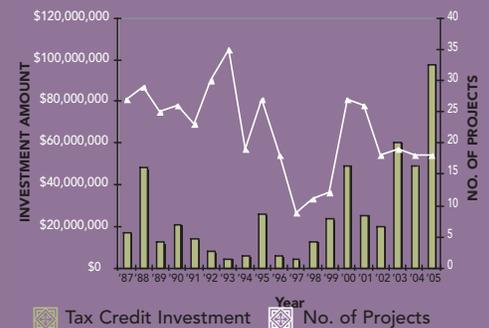


Even more significant are the grants-in-aid awarded by the Florida Division of Historical Resources. Florida has one of the nation's largest and most successful grant programs, having awarded some \$81 million support over 780 preservation projects since 2001. There are two types of grants funded by the Division of Historical Resources: 1) Acquisition and Development Activities; and 2) Survey and Planning Activities. The former category includes most matching grants, and also includes such activities as restoration, rehabilitation, salvaging of archeological sites, and the preparation of drawings or photographs of threatened historic sites. Survey and Planning grants-in-aid include community education and relations projects which promote historic and archaeological preservation. In addition, so-called Special Category

grants are non-matching grants for projects of exceptional importance, including public buildings such as courthouses, churches and theaters.

Some communities provide their own grants, and low-interest loans, to promote historic preservation. For example, Tampa's program is funded by the sale of historic properties restored by the federal government as part of the I-4 mitigation

Federal Rehabilitation Tax Credit Investment in Florida 1987-2005



program. Miami-Dade County's new Building Better Communities program will be funded by a bond program approved by voters in November 2004.

Smaller communities are also able to provide grant and loan incentives. In Kissimmee, the Community Redevelopment Agency (CRA) and Main Street Program use the tax increment financing from the CRA to fund grants to improve historic façades and restore historic structures within the CRA.⁶ Kissimmee's CRA has awarded over \$570,000 in matching grants to businesses and homeowners within the district since 1998.⁷

Florida Main Street Program

The Main Street Program was established by the National Trust for Historic Preservation in 1980 to help revitalize historic downtowns, especially in smaller communities. Since its founding, some 2,000 communities in forty-one states have benefited from the small grants and technical assistance provided by the Main Street Program which focuses on four key elements of revitalization: 1) Design; 2) Organization and consensus building; 3) Promotion and marketing of the Main Street; and 4) Economic Restructuring.

Florida has had an active Main Street Program since 1985, working in some 75 Florida communities. During that period, Florida Main Street has generated some \$1.37 billion in public and private investment in both rehabilitation and new construction, witnessing the start of over 3,600 new businesses and over 11,000 new jobs.⁸



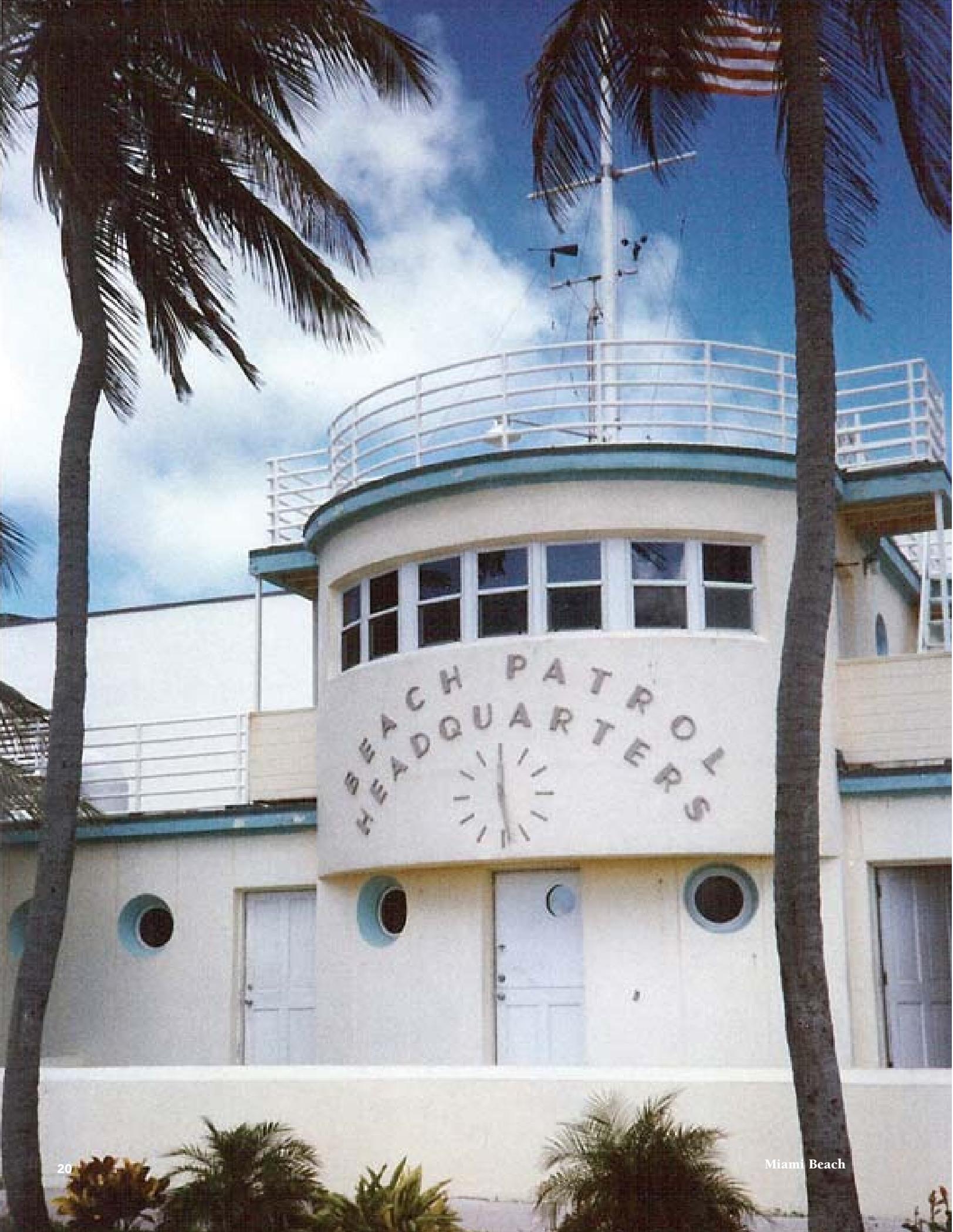
Bok Tower, Lake Wales

Examples of Main Street Programs:

- **Milton** – streetscaping & restoration of the historic Imogene Theater, damaged by Hurricane Ivan in 2004.
- **Melbourne** – master plan for old downtown, adopted together with city and chamber of commerce.
- **Vilano Beach** – New Town Center and Beach pavilions.

The Waterfronts Florida Partnership, run by the Department of Community Affairs, offers similar support to smaller waterfront towns, focusing on small grants, planning and technical assistance to help maintain water-dependent uses and traditional waterfronts. Though not primarily a historic preservation program, several partner communities, including towns like Cortez, St. Andrews and Crystal River, have used Waterfronts Florida support to address historic and cultural resources.

1. These tax exemptions are authorized by FLA. STAT. § 196.1961.
2. These tax exemptions are authorized by FLA. STAT. § 196.1997.
3. These tax exemptions are authorized by FLA. STAT. § 196.1998. See 2005 FLORIDA DEPT. OF REVENUE, FLORIDA PROPERTY VALUATIONS & TAX DATA Table 44 (May 2006).
5. Florida awards under Save America's Treasures since 1999 total \$4,741,318. See National Park Service, *Save America's Treasures, Funded Projects*, available online at: <http://grants.cr.nps.gov/treasures/treasures.cfm>.
6. Tax increment financing (TIF) makes use of increases in property tax revenues in designated geographic area to fund certain activities. Once a tax increment district is established, it sets a base year in which the aggregate tax value of the district is set. As property tax revenues increase over the established aggregate value, the amount of excess is the tax increment. A CRA or other entity entitled to receive the tax increment may then use them for designated purposes. See Sam Casella, *What is TIF in Tax Increment Financing* 9 (Planning Advisory Svc. Rep. No. 389, APA 1984). In Florida, TIF under the Community Redevelopment Act has provided a mechanism for successfully funding downtown revitalization, including historic preservation activities. See FLA. STAT. ch. 163, pt. III.
7. Information about Kissimmee's CRA and Main Street program is available at: <http://www.kissimmeeccra.com>.
8. See "Florida Main Street Communities Quarterly Report Data Base," information supplied by Angela Tomlinson, Florida Main Street Program Assistant, Florida Department of State (June 19, 2006). Further information about Florida Main Street is available online at: <http://www.flheritage.com/preservation/architecture/mainstreet/>, and information about the National Trust Main Street Center is available at: <http://www.mainstreet.org/>.



Heritage Tourism

“Heritage tourism “affords a solid foundation that sustains the resource as well as offering a social and economic impact.” - Cheryl Hargrove, First Director of the National Trust for Historic Preservation

Historic preservation at the county level is quite different than at the city level. When considering historic preservation at the county level, historic preservation is a mix of the historic structures that qualify as historically significant to the architecturally-oriented preservationist, plus the events that take place in and around these structures, the traditions associated with the area and the structures, the perpetuation of arts and crafts that reflect a threatened way of life endemic of the area, the festivals celebrating the history of the people, and the area that distinguish the historic preservation of the county.

Using this broad-reaching concept of historic preservation, this study proposed that a county's quality of heritage tourism would be indicated by the percentage of annual tourist-related tax revenue allocated for historic preservation. As of November 30, 2004, fifty-three Florida counties levied a lodging tax. Using the data in the *2005 Report on Florida's Tourist-Related Taxes*, each Florida County's tourist-related tax revenue expenditures allocated by categories was compared, using the broad-reaching definition of historic preservation. The second part of the study involved opened-ended survey

question responses from only those 53 Florida counties reporting collection of tourist-related taxes in 2003-2004. The participants in the survey were county representatives of either the convention and visitor bureau or the tourism development council.

FINDINGS:

- ❖ 53% of Florida counties support historic preservation using bed tax revenue.
- ❖ Capitalizing on their assets, rural counties allocate a higher percent-



age of bed tax revenue to historic preservation. Eight of the top ten counties for percentage of bed tax revenue allocation are considered rural by the State of Florida: Suwannee, Monroe, Putnam,

Highlands, Hendry, Taylor, and Washington.

❖ Historic preservation is viewed as an investment in the community. Where history and nature are the main attractions, historic preservation can regenerate bed tax revenue.

❖ Many counties indirectly support historic preservation through secondary spending. For example:

1. Profits realized from the Creekside Festival

go to the actual preservation of Princess Place Preserve.

Top Ten FL Counties by Both 2005 Tourism Report and by Survey

2005 TOURISM REPORT

COUNTY	HP%*
Suwannee	60.00
Monroe	31.70
Alachua	28.33
Santa Rosa	25.00
Palm Beach	17.60
Sarasota	17.00
Martin	15.00
St. Johns	15.00
Indian River	12.00
Putnam	10.00

SURVEY

COUNTY	HP%*
Suwannee	60.00
Monroe	31.70
Hendry	30.00
Highlands	29.00
Alachua	28.00
Indian River	26.00
Taylor	24.00
Martin	15.00
Putnam	10.00
Washington	8.60

*HP = Percent of annual lodging tax revenue used for historic preservation



Edison Ford Estates

2. Edison Ford Estates uses profits from bed tax funded marketing efforts to restore the historic the Edison Ford Estates.
3. Hillsborough County uses a historic building for a visitor information center. The county can use bed tax dollars to historically preserve the building.

SUWANEE COUNTY

“Historically-oriented events are putting heads in beds, so the Tourism Development Council is willing to give more grants. The Tourism Development Council, [a nine member council appointed by the County Commission to oversee tourism], is very interested in historic preservation,” according to Greg D’Angio, Marketing Director, Suwanee County Tourism Development Council. A perfect



Suwanee County Historical Museum is housed in Old Train Depot. Recipient of multiple preservation grants from the State of Florida, this museum receives lodging tax revenue funding from the Suwanee Tourism Development Council.

Photo courtesy Suwanee Tourism Development Council

example of the way this county is attempting to capitalize on the heritage, cultural and historic events is the annual December month-long event, Suwanee Lights, with the slogan, “See the lights, stay the nights.”

Suwanee County, with a 2% bed tax, or \$77,161, listed 60%, or \$46,297, of its short-term lodging revenue allocated to tourism promotion. The decision to count the 60% as historic preservation in the broad-reaching definition was based upon the corresponding specific projects for this revenue, which were historic museum, concerts, renaissance festivals, Cinco de Mayo festivals, southern bicycle league event, blueberry festival, pageants, Suwanee River Jam, and other community events. This 60% for the revenue category of tourist promotion has been basically the same since 1995. The one item of note for Suwanee County is that an additional 30% of this county’s tourist-related tax revenue has been earmarked for tourism development with corresponding specific projects and promotion of specific projects such as annual cultural events, community events, festivals, and concerts. These, too, could actually meet the broad-reaching definition of historic preservation, thus showing all but 10% of Suwanee County’s 2003-2004 tourism-related tax revenue going to historic preservation.

MONROE COUNTY

Monroe County, in southern Florida, had a 4% bed tax in 2003-2004 generating \$13,840,916. The county allocated 31.70%, or \$4,387,570 toward historic preservation based upon the Bricks and Mortar revenue specifically earmarked for museum preservation and maintenance. It should be pointed out that also included in the category of Bricks and Mortar for Monroe County, was beach maintenance and renourishment, artificial reef projects, nature center projects, and an amphitheater project. It can be debated whether the total 31.70% should be considered historic preservation, particularly the beach and reef allocations, but since there was-



Photo courtesy of Monroe County TDC

The Key West Heritage House Museum and Robert Frost Cottage, home of the Annual Robert Frost Poetry Festival, funded by the Monroe County TDC, promotes cultural heritage and historic architectural preservation.

n’t further breakdown of the 31.70%, the total percentage was considered as revenue allocated for historic preservation. Since 1995, Monroe County has allocated from 7% to 31.8% to the Bricks and Mortar category, and, according to Monroe County Tourism and Development Director, Harold Wheeler, “every year we fund a museum preservation and maintenance project.” The revenue disbursement for these capital projects can be through direct allocations or on a request for proposal basis, and may be used for historic preservation or cultural projects. Wheeler states that for this county, cultural projects can include envi-



Satellite Visitor Information Center housed in the last Spanish-owned structure in St. Augustine, is partially funded by the St. Johns County TDC using lodging tax revenue.

ronment, architecture, archaeology, arts, and natural environment.

ST. JOHNS COUNTY

St. Johns County, home of Florida's premier Heritage Tourism destination, St. Augustine, allocated 15% (\$662,360) of its 2003-2004 3% tourism-related tax of \$4,415,735, for arts and cultural events. Receiving more than three million visitors annually, St. Augustine received \$100,000 of lodging tax revenue for Visitor Information services housed in his-

toric properties. The Tourism Development Council uses lodging tax revenue in the form of Category II grants for arts and cultural events. In 2002-2003, the same percentage was allocated for arts and cultural. One special note for this county is that in the past, and for three consecutive years, funds were allocated from capital projects for the National African-American Museum and Archives. The St. Johns County Tourist Development Council was the Premier Sponsor of the 2006 Annual Conference of the Florida Trust for Historic Preservation, held May 2006 in St. Augustine.

- Hargrove, C. M. (2002). Heritage Tourism. *Cultural Resource Management* (25), 1. Retrieved March 22, 2006, from <http://crm.cr.nps.gov/archive/25-01/25-01-4.pdf>
- Interview with Harold Wheeler, Marketing Developer, Monroe County Tourism Development Council (January 9, 2006)
- Interview with Greg D'Angio, Marketing Director, Suwanee County Tourism Development Council (November 30, 2005)
- Florida Statutes 381.0406 F.S. Rural means an area with a population density of less than 100 individuals per square mile or an area defined by the most recent United States census as rural.

Historic Preservation Study: State of Florida

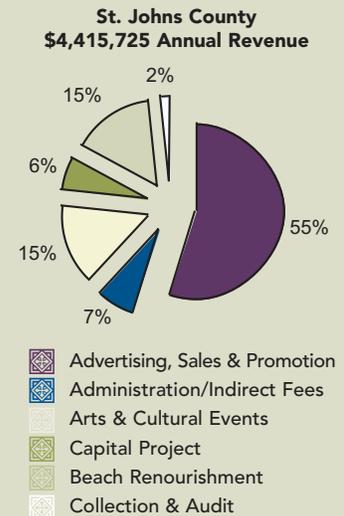
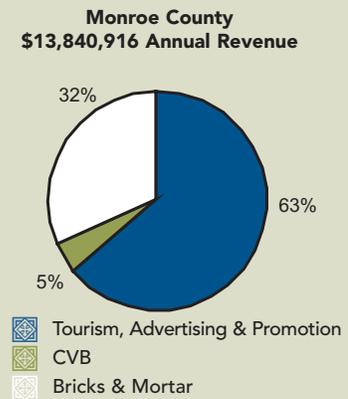
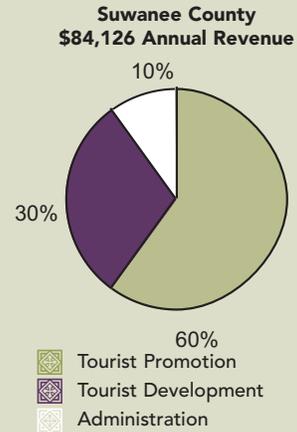
In 2005 and 2006, The Center for Tourism Research and Development conducted this research as one of the principals of a multi-faceted, multi-departmental study through the University of Florida Center for Government Responsibility titled "Contributions of Historic Preservation to the Quality of Life of Floridians". The study, coordinated by Drs. John Confer and Dr. Lori Pennington-Gray, and conducted by master's student Catherine Culver, was supported by the Florida Department of State. The study examined each of Florida's 64 counties' reported tourist-related tax revenue and expenditures for 2003/04 as published in Florida Tourism Committee 2005 Report on Florida's Tourist-Related Taxes. Additionally, personal interviews were conducted of Convention and Visitor

Bureaus Directors of each of the 53 Florida counties collecting tourist-related taxes in 2003/04.

Specifically, the study sought to address the following areas:

1. Demonstrate the direct relationship of Florida Tourist-Related Tax expenditures for Historic Preservation and quality Heritage Tourism.
2. The higher the percentage of annual tourist-related tax revenue allocated to historic preservation, the higher the quality of heritage tourism enjoyed by the county.
3. In Florida, the percentage of tourist-related lodging tax revenue expenditures allocated to historic preservation will indicate the quality of heritage tourism in Florida by county.

Use of Revenue by Category





History Museums

Two hundred and fifty-eight institutions identify themselves as “history museums” in the state of Florida. They are as diverse as the state itself.

History museums may celebrate local, regional, or national places and events; or they may range in focus from the display of a collective past to the representation of a single episode. Some museums contain objects of historic interest and importance, while others preserve books, papers, and ephemera relating to Florida’s past. Many, by certainly not all, history museums are housed in historically significant buildings. Despite these and many other differences between these institutions, the one thing shared by state history museums is a dedication to serve Florida’s citizens and to augment the quality of their lives.

COMMUNITY

History museums make their communities better places to live in a variety of ways. Many, like the Ah-Tah-Thi-Ki Museum or the Fort Christmas Historic Park organize special cultural events and family festivals for local residents. Others work with local government to increase public awareness of issues such as preservation and conservation. They

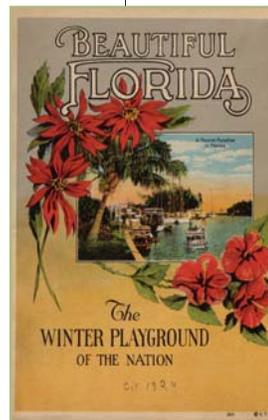
initiate special hours, staying open at night, so that the museum is available to all segments of the regional population. Many museums are free or make only nominal charges to offset their expenses. Books, photographs, and papers relevant to regional and local history are preserved by museums such as the St. Augustine Lighthouse and Museum or the John Riley House. These materials are preserved for the public and made available at the museum or historical society.

Many history museums have focused their attention on local and regional identity. To that end, museums like the Indian River Citrus and Heritage Museum train high school students to do oral interviews. Other institutions, such as the Fort Christmas Historical Park, sponsor individuals who demonstrate local crafts, stories, industries, and agriculture. These

efforts preserve historical memory and traditions and pass them along to a new generation. Recently we have seen the growth of museums that have emerged to address previously underrepresented constituencies. Holocaust museums and museums devoted to African-American or an emigrant experience, for example, contribute to our understanding of the rich diversity of Florida’s cultural history.

Florida’s citizens demonstrate their support for museums, and the central role museums play in their lives, in a variety of ways.

They join membership groups and museum friends’ groups, donate objects to enhance museum collections, and volunteer countless numbers of hours. Citizens also serve on museum boards. Almost all museum boards in the state are composed of a majority of members from the local and regional communities. These individuals offer their services and raise funds to maintain the museums and, at the same time, assure that the museum adheres to its mission and represents the inter-



ests of the community. Without the support and assistance of the citizens in their communities, history museums would not be able to play such a vital role in our communities. Museum's effects take a variety of forms. In response to the deprivation of citizens after a hurricane, the La Belle Heritage Museum produced a "storm gourmet" cookbook of recipes that did not require cooking or heating. The Baker Block Museum in Baker provides traveling exhibitions to daycare centers, nursing homes, and adult education centers.

EDUCATION

The most obvious impact of history museums on the citizens of Florida, however, is the effect they

have on the education of the state's children. History museums and the collections they so carefully preserve, make the history studied from the flat pages of a book pop into three-dimensional reality. Seeing a place, standing in a location, viewing an object, or performing a task — students see and feel the local and state history that surrounds them. Over half of Florida's history museums provide special programming tied to the Sunshine State Standards. Most supply programming for teachers who are charged with teaching Florida history to fourth grade students. This effort, however, is just the tip of the iceberg of educational outreach. Museums like the Eustis History Museum host essay contests that

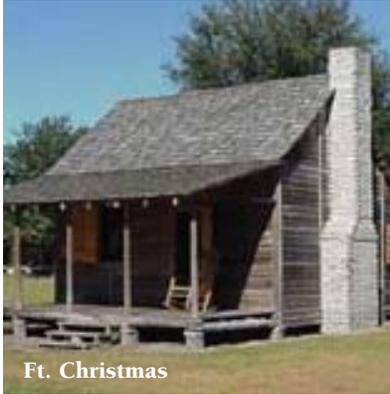
are used to prepare students for the FCAT writing prompts. The St. Petersburg Holocaust Museum offers free training for local teachers and invites visiting classes to decorate a tile that is exhibited on the third floor of the museum. Almost 20% of history museums have materials from their collections that they bring directly into the classroom for those students who cannot visit the museum. For those who are fortunate enough to be able to make the trip, museums offer hands-on workshops where students can experience the thrill of an archeological dig or the pleasure of learning a traditional handicraft. Museums like the Morikami Museum and Japanese Garden in Delray Beach work with at-risk children and young adults, reconnecting them to the community. For those students who are interested, museums provide internships that prepare future leaders of the museum community.

ECONOMY

History museums also positively affect the economies of the community. Most obviously, they bring in tourist dollars by offering special events and festivals like Boca Raton Historical Society. They advertise widely and build elaborate websites that not only give directions and highlight the museum but also the cities and towns in which they are located. People visit museums for a variety of reasons. Some come to see a particular exhibition. For others, the historical importance of archival holdings of history museums supports genealogical research. Research has shown that museums are a stimu-



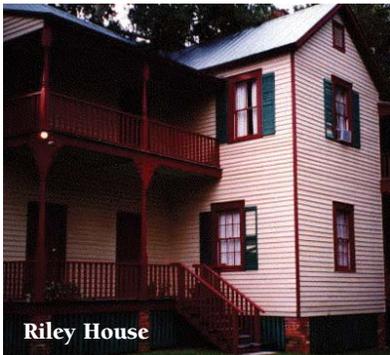
Mission San Luis, Tallahassee



Ft. Christmas



Cape San Blas



Riley House



Vizcaya Museum and Gardens

lus to the economic activity of the immediate area. Especially in urban areas, restaurants, historic preservation zones, and gift shops surround museum locations. Museums affect the economic health of the region by participating in local civic organizations like the Better Business Bureau or the Chamber of Commerce, by forming

strategic partnerships with local businesses, and allowing community groups to use their facilities for meetings and/or social gatherings. Museums like the Historical Smallwood Store Museum in Chokoloskee partner with local businesses for advertising and to package tourist services such as trolley and airboat rides.

Businesses recognize museums as a critical element in the social fabric and show their support by partnering with museums to offer discounts to museum visitors, sponsor exhibitions and special events, and to join museum friends groups.

1. The Florida Association of Museums allows member institutions to self define their focus. Categories of museums are: history, science, art, and natural history.



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Historic and Affordable Housing

Florida's historic residential neighborhoods offer a range of housing types, configurations, and features to accommodate the state's diverse populations based on income, stage of life, and household size.

Further, as sustainable development becomes an increasingly significant strategy to address growth pressures, the proximity of historic neighborhoods to the central business district and other amenities conveys additional benefits. Such housing may also be among the last units affordable to lower- and moderate-income working families, especially in the hot housing markets of Florida where the gap between median income and median home value is rapidly increasing. Traditional tools, such as tax credits, and innovative ones, such as community land trusts, are offering creative solutions to safeguard affordability, to accommodate the state's increasingly diverse population, and to realize sustainability goals.

Often historic preservation is not a strategy undertaken in older working class neighborhoods unless those areas are undergoing gentrification, resulting in displacement of lower income households with ones of much higher income. While vernacular struc-

tures are now appreciated, they are often still perceived as distinct from the historical, social, and political significance of such places. With a livable community as a central goal, historic preservation can safeguard these features while addressing affordable housing needs.

Among the benefits associated with preserving older and historic neighborhoods are the higher percentage of affordable units as compared to new developments and the proximity to work, school, shopping, and public transit. Almost 80% of those sampled living in central cities rated their neighborhoods as 6 or better on a scale from 1 to 10 where 1 represented the worst conditions. While not all of these units were historic (50 years old or older), generally, central city neighborhoods contain a higher percentage of historic structures as compared to



the overall metropolitan area. Given the number of historic housing units that provide shelter for lower income persons, affordable housing should be a central consideration in historic preservation policies and programs.

Florida's State Plan specifically identifies historic preservation as a significant revitalization tool.

Further, the state pledges to increase the supply of affordable housing in part by "recycling older houses and redeveloping residential neighborhoods" (2005 FS. Chapter 187.201 (4)(b)3). Florida's lower income households have a demonstrated housing need and the state's growth

management legislation outlines how local governments can integrate historic preservation and affordable housing goals.

What tools then are available to meet these goals, specifically to attract the private sector to undertake such rehabilitation projects? Among them are building codes that accommodate rehabilitation, neighborhood conservation districts to complement local historic districts, community land trusts,



Tampa

Conservation Districts

ZEPHYRHILLS, TAMPA, MIAMI, SARASOTA

While a relatively new tool in Florida, conservation districts offer a means for local governments to flexibly address historic fabric more broadly to encourage protection, rehabilitation, and revitalization that is sensitive to a neighborhood's distinctive culture and character. The cities of Zephyrhills, Tampa, Miami, and Sarasota are all currently using this approach. In Zephyrhills, the Urban Conservation District is structured as an economic revitalization tool. The city requires that certain minimum criteria be met prior to approval of an Urban Conservation plan or district, namely a finding of blight, unsanitary conditions, or the potential for blight. In Tampa, the Old Seminole Heights Neighborhood Association advocated passage of an NCD to complement the two historic districts – the Seminole Heights Historic District and the Hampton

Terrace Historic District – by ensuring compatible residential design consistent with the “historic character” in these adjacent neighborhoods. Initially adopted in 2001, the Seminole Heights Residential Overlay District Development Standards apply only to residential properties.



Zephyrhills

expansion of existing revitalization programs such as Front Porch Florida, the historic rehabilitation tax credit combined with the low-income housing tax credit, preservation easements, revolving loan funds, property tax relief to address increased property values due to historic designation, and coordinated planning to proactively address potential challenges such as gentrification. Two of these tools, conservation districts and community land trusts, are discussed in greater detail below. For a more in-depth discussion of all of these tools, see the Technical Report.

Neighborhood conservation districts as local regulatory tools

When local historic districts are created, typically a conventional zoning or an overlay district is adopted to establish specific regulations associated with the historic designation. Overlay districts function in concert with the underlying zoning. Requirements and incentives can be tailored to address land uses and development characteristics distinctive to an area – such as historic urban fabric. Typically historic overlay districts require conformance with design guidelines and can alter the underlying setback, height, and use requirements, not just for additions or changes to existing structures but also for new infill development.

Neighborhoods might contain historic homes that are not eligible for historic designation due to lack of integrity or significance, or they may lack a sufficient concentration of these homes. Other neighborhoods may have homes nearing the 50-year mark that do not yet qualify for historic designation. Neighborhood conservation districts (NCD) assist in safeguarding neighborhood character, particularly in areas proximate to high growth centers. Residents and local officials are turning to this regulatory tool to complement historic overlay districts. NCD requirements

tend to be less extensive, focusing more on character and less on detailed design guidelines to protect historic fabric. Like historic overlay districts, NCDs can be tailored to address the unique characteristics of the community. As this approach becomes increasingly popular, questions remain concerning how NCDs really differ from local historic districts and, more critically, whether it is appropriate to “designate a residential neighborhood as a conservation district when it meets the criteria for designation as a historic district”.

Community land trusts:

Community land trusts offer a means for non-profits to create opportunities for longer-term affordability, particularly in lower valued areas when housing prices begin to increase. This long term affordability is secured by the non-profit’s ownership of the land in trust with the household purchasing the home with certain constraints on its resale value. Originally begun in the Northeast – Burlington, Vermont has one of the largest inventories of such properties – this strategy to ensure long-term affordability has just recently been adopted in Florida. In addition to maintaining housing affordability, community land trusts can also safeguard historic structures by retaining them in the housing inventory and assisting in their rehabilitation. The Bahama Conch Community Land Trust, the first such non-profit in Florida, is the only community land trust in the state that specifically addresses the twin goals of affordability and historic preservation. In addition to addressing gentrification, a key goal in forming the non-profit was the preservation of the historic African-American community. As such, the community land trust offers



a means to maintain the cultural and historical qualities that contribute to Florida neighborhoods while also meeting affordable housing goals.

Neighborhood Revitalization – A Caution:

Neighborhood revitalization through safeguarding and enhancing existing historic and cultural resources is a central goal of many local historic preservation programs. In addition, aesthetics, culture, and history often are essential factors in creating an economic development strategy. These qualities though, among others, can also characterize gentrification. If the city drafts “a unified vision and plan” based on an understanding of the context, controls property to better direct redevelopment, and communicates with and empowers the residents and property owners to ensure social equity, it will be much better able to make any resulting gentrification work for all members of the community.

Indicators to Assist in Targeting Combined Historic Preservation and Affordable Housing Goals:

Thus, affordability and historic preservation can reinforce each

other, contributing to the quality of life in Florida. Clearly growth management legislation in Florida, with the embedded commitment to consistency and concurrency, creates a structure for coordinated comprehensive planning. In addition, tools such as conservation districts, community land trusts, coordinated tax credit projects, and the Front Porch program offer a means to creatively engage the private sector while safeguarding significant resources and expanding affordability options. Employing these indicators as a means to establish, monitor, and adjust integrated plans and strategies will result in a greater connection between historic resources and the availability of housing for lower income persons. Indicators that assess historic preservation in combination with affordable housing include:

- ❖ Distressed historic neighborhoods: the presence of such neighborhoods signal a potential resource that, given the appropriate public sector programs, can contribute to historic preservation opportunities that increase the supply of decent, affordable housing.



Community Land Trusts

KEY WEST

In the hot housing market of Key West, the Bahama Conch Community Land Trust (2005) seeks to prevent the gradual loss of the neighborhood to gentrification and the physical deterioration of the housing stock by purchasing historic properties, renovating and rehabilitating them as needed, and then selling or leasing the homes to income-qualified individuals with the idea of “helping the community become the beneficiary of change, rather than the victim” (Sawyer-Atanda, 2005). To date, the BCCLT has managed to preserve seven historic homes for single-family use and two additional multi-family buildings, located in the Key West Old Town Historic District. These homes, all constructed prior to 1950, house 31 low to moderate-income residents, combining the sometimes competing goals of historic preservation and affordable housing. BCCLT also assists potential buyers in

securing financing for properties. The organization has been able to foster a sense of community by becoming deeply involved in local activities and affordable housing efforts, the African American cultural community, the environmental community and the historic preservation community.



- ❖ Conservation districts offer a means for local governments to introduce some controls to protect such areas without requiring the age, integrity, or concentration of significant structures requisite for a locally or nationally recognized district.
- ❖ Rehabilitation/certified tax credits: combining these credits is a popular approach to rehabilitating income-producing residential properties. Using the competitive application process to privilege, rather than punish, developers who do so ensures that these projects are more likely to be financially viable. Further, adjusting the rehabilitation guidelines to more flexibly respond to the significance of the historic structure ensures greater responsiveness to affordability concerns without compromising historic fabric.
- ❖ Assessed property value trends: evaluating this data offers a means to gauge whether a neighborhood is distressed and thus a candidate for certain interventions.
- ❖ Historic district/property reinvestment: communities that make community reinvestment decisions that integrate historic preservation and affordability goals through coordinated efforts such as layering relevant programs, should score higher points than those that simply support historic preservation reinvestment.
- ❖ Historic preservation element/ plan integration: an integrated approach results in better allocation of scarce resources. Further, design guidelines, preservation ordinances, and disaster preparation and response that implement such plans will reflect a greater sensitivity to lower income households while maintaining historic preservation goals.
- ❖ Participation in other state/federal programs and other incentive programs: participation in programs such as Front Porch or community land trusts where opportunities to



integrate historic preservation in tandem with affordable housing strategies represent positive indicators for evaluating approaches that enhance the quality of life in Florida.

- ❖ Historic preservation non-profits: non-profits, such as CLT's that address both affordability and preservation goals, should be weighted as a stronger quality of life indicator.
- ❖ Neighborhood participation: neighborhood participation in recognizing and fostering distinctive cultural and historical characteristics is particularly difficult in lower income communities where such goals are considered secondary to more pressing economic needs. Hayden outlines the necessity and benefits of an integrated strategy of revitalizing and sustaining such places.
- ❖ Tax exemptions: tax exemptions are available to all owners of eligible historic properties in Florida communities that have officially adopted this strategy. Generally, they contribute to housing affordability by making the tax on improvements a relatively less expensive proposition for as long as ten years.
- ❖ Housing affordability: if the indicators listed above are actively employed, then this indicator will reflect "the community's commitment to providing affordable housing while at the same time enhancing its historic resources."

By using indicators to identify opportunities and challenges and by adopting tools that safeguard these resources while encouraging private sector participation, revitalization of working class homes and neighbor-

hoods is possible. As population pressures continue to mount and housing prices continue to escalate, realizing historic preservation and affordability goals will ensure an enhanced quality of life in the state.

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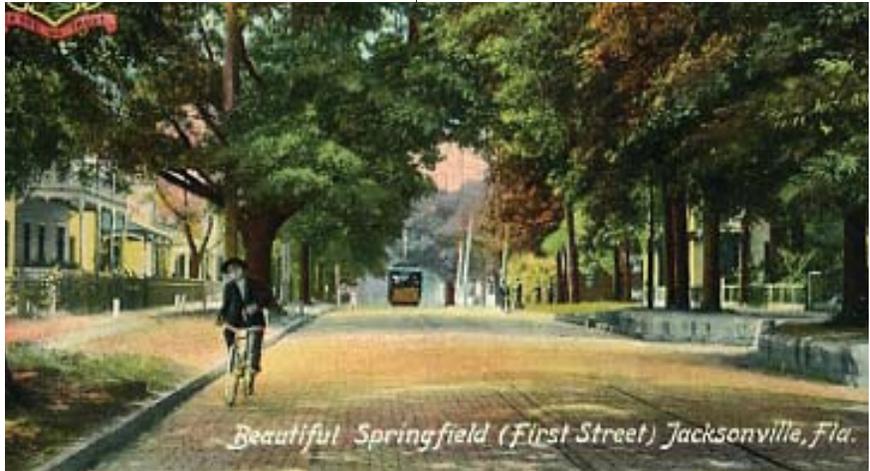
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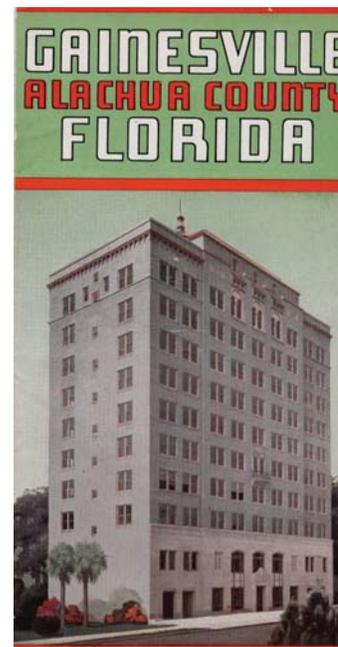
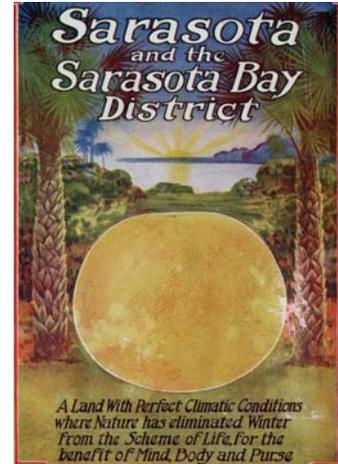
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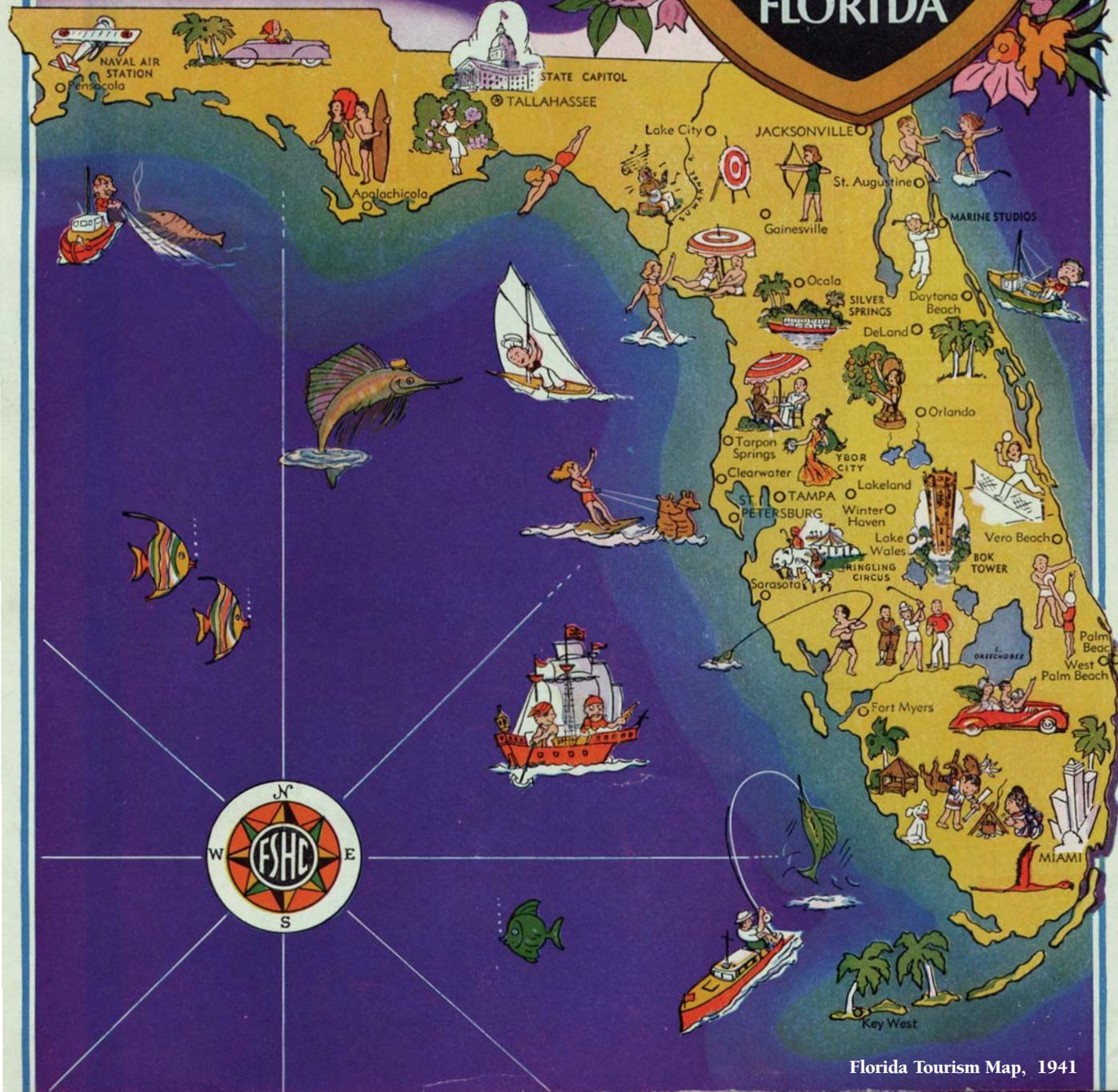
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Florida Tourism Map, 1941



